Yellow Task Web System User Guide

Background

In 1999 the specific requests for information, cost estimates, and directed action from the National Cancer Institute (NCI) was formalized into the Yellow Task System. This system was established within Leidos Biomedical Research Inc. (Leidos Biomed), formerly SAIC- Frederick Inc., as a formal approval system.

In conjunction with the National Cancer Institute and Computer Statistical Services, Leidos Biomedical Research Inc. transformed the manual Yellow Task System to an electronic web based system in 2003. This system has been designed to create a more efficient and expedient mechanism to request services and obtain approval.

Purpose

This guide is intended to steer users of the Yellow Task System through the process of submitting a request for services from Leidos Biomedical Research Inc. The guide explains the procedures of the web-based system for new users as well as repeat users. A flowchart is included to illustrate the flow process of a request. Task responsibilities within the system are referenced by the position. Contact information for participants can be found below.

Comments on the system can be forwarded to the Leidos Biomed Yellow Task Coordinator at burgeg@mail.nih.gov.

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Types of requests

Service request types include but are not limited to the following:

- Clinical Monitoring Support: Behavioral Sciences, Clinical Administration, Project Management, Clinical Support, Clinical Trials Management, IRB-DSMB, Protocol Navigation, Programmatic Support

- Laboratory Services: Staffing, Subcontracts

- Animal Services: Animal holding, Colony expansion by IVF, Technical staff support

- Project/program support: Research lab support, Procurement/finance support

- Support Resources: Subcontracts, Acquisitions, Information Management, Administrative

Contact information

The following individuals are participants in the Yellow Task process. For questions regarding the Yellow Task System and the process of information, please contact the Leidos Biomedical Research Inc. Yellow Task Coordinator at burgeg@mail.nih.gov or 301-228-4543.

NCI-Frederick Contacts

Contracting Officer Technical Representative
        Craig Reynolds   reynoldc@mail.nih.gov   301-846-1302

Contracting Officer
        Stephen Davis   stephen.davis2@nih.gov   301-846-1112

Facility Administrator
        Debbie Guy   guyde@mail.nih.gov   301-846-1106

        Altia Sherman   shermaal@mail.nih.gov   301-846-1214

Leidos Biomedical Research Inc. Contacts

Chief Administrative Officer
        David Bufter   bufterd@mail.nih.gov   301-846-1086

Yellow Task Coordinator   burgeg@mail.nih.gov   301-228-4543

Severable vs. Non-Severable services

Severable Services

Services that are routine, repetitious and continuous are considered severable services. These services are recurring in nature—such as IT repair or security services—where an agency realizes a benefit at the time services are provided even if the contract has not been performed to completion.

If the task, service, or deliverable is expected to be fully completed (committed or expended) within 12 months of being added to the contract it can be considered severable. However, it is possible for some projects to take longer than 12 months but, segments or milestones reached in 12 months or less will still have commensurate value for the shorter periods. Accordingly, these projects can be considered severable. In either case no more than 12 months worth of funds can be added to the contract.

Examples:
Data collection where the value of the data is received as collected, Medical or Lab staff (FTE), IT repair, helpdesk, or support

Severable services are funded by annual appropriations. Each annual allotment of funds must be expended within 12 months of the date of obligation. Any funds remaining after that time must be de-obligated.

Non-severable (or "entire") Services

Services that produce a single or unified outcome that cannot feasibly be subdivided into separate performance outputs each fiscal year (such as a report from a research project that will not be presented until the next fiscal year). If you pay for a final finished product and would get little or no value if the contract was terminated before completion, it is a non-severable service contract. The contract normally requires the contractor to complete and deliver the specified end product (e.g., a final report of research accomplishing the goal or target).

Non-severable projects therefore must be fully funded to cover their entire duration when placed on the contract, or phases within those projects must be identified and fully funded within that project. You will therefore need to specifically identity them in your funding request and include full funding at that time to carry the projects through completion.

Examples:
Clinical Trials and associated Recruitment and Coordinating Centers, Data collection, Data analysis contracts, Vaccine or drug efficacy studies, Consultant study conducted over several months, Basic research that advances science, IT/software development, Statistical, Analytical, Evaluation services

NOTE: Funding of ongoing OTS services would be subject to an EAC spend analysis to ensure that funding levels are proportional to the rate of expenditure. Funding of YT projects would be

dependent upon whether they are identified as severable or non-severable tasks. Also, keep in mind that under the YT process, Leidos Biomed will develop an estimated budget for each of these projects in conjunction with the program office. Projects not advancing after six months, i.e., no yellow task initiated, will be returned to the project office, or, the Cost Center may be removed and the funds spent for general OTS activities.
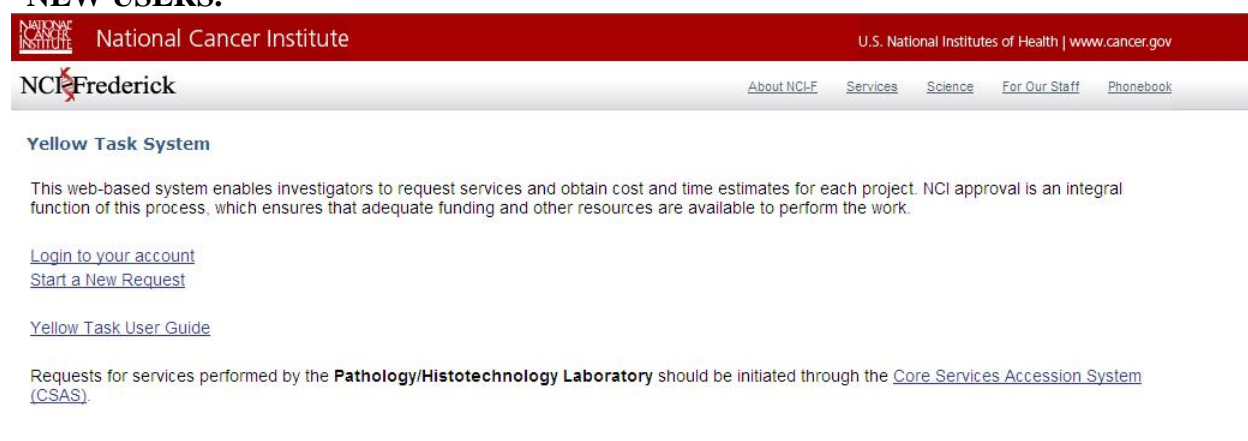
MOSB Points of Contract:
Stephen Davis: 301-846-1112 stephen.davis2@nih.gov

Request Initiation

To initiate a request visit the following web site:
http://ncifrederick.cancer.gov/campus/yellowtask/
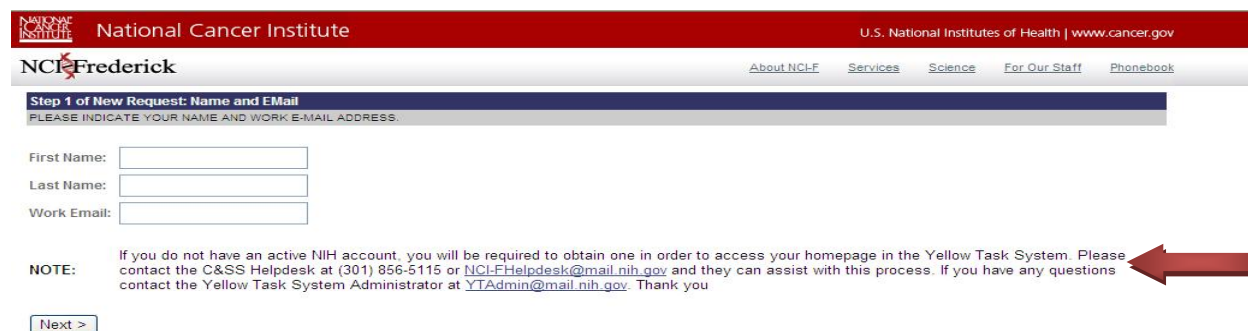
Figure 1 - This screen is applicable for all new users. **For repeat users, please follow the instructions for "REPEAT USERS". For all other users, please follow the instructions for "NEW USERS."**

New User

Figure 2 - If you are a new user to the system, enter your general demographic information before proceeding to the task selection process. Users will only be prompted for this information

one time. The next time the user makes a request the system will recognize the user and the "Requester Information" step will be skipped.

Figure 3 - Use the drop down box to select the appropriate Institute.

Figure 4 - An Administrative Officer (AO) is assigned to each Institute/Agency listed in the drop down box.

Figure 5 - This screen begins the task selection process. For services not listed, select the "other" box at the bottom of the yellow box. Select all services that apply. Depending on your

selections, a template(s) will be made available to you in the next step to assist you with completing your Statement of Work.

Figure 6 – In step 5: Indicate whether the work is severable or non-severable. For an explanation of the difference between severable and non-severable, click the "Definitions of Severable/Non-Severable" link below. Complete the description box (required). If you wish to upload a file

(e.g., SOW template) with the description of your request and/or the statement of work, indicate this in the description box with verbiage such as "description is attached" or "statement of work is attached." The next screen will allow you to upload documents. From your selections in step 4, template(s) will be made available to you. If more than one is listed, select the applicable template(s) to assist you in completing a comprehensive statement of work.

Figure 8 **-** This is the last step of the task selection process. Here you can upload any accompanying documents that you may want to include. You will be prompted to verify your information prior to the actual submittal.

Repeat User

As a repeat user, there are two options for submitting a request.

1) From the requester's homepage, select "Make a new Yellow Task Request." This will direct you to Step Four: Task Selection, Description and Files.

2) Select the link "Login to your account" from the yellow task system homepage. Enter your login number and the system will direct you to Step Four: Task Selection, Description and Files page.

   If you do not have the login number, click the word "here" underlined in blue in the first sentence. Enter your email address. The system will immediately send you an email with a login number. The email will also include a link to the login screen. Copy and paste the login number. This will take you to the Yellow Task Login Page where you will need to enter your NIH login credentials. From here you can place your request. I recommend bookmarking this link so that in the future you can bypass the initial steps (login number) to get to your account. If you do not have an active NIH email address, please see instructions below in the "Login Information" section.

Request Submission

When a request is submitted, the Requester will receive an email notification with a link to the request. Also included in this email will be the Requester's login ID, which will allow the user to access completed and current tasks, as well as submit new requests. Once you submit the login number you will be asked to enter your NIH login credentials. If you do not have an active NIH email address, please see instructions below in the "Login Information" section.

Login Information

The Yellow Task System requires users to have an active NIH email address in order to access the system. ***You may still submit a new request without an NIH email address, but must obtain one in order to interact with the system beyond that point (view your homepage, review and approve YTs, send emails through the YT System).***

If you do not have an active NIH Email address, please contact the C&SS Helpdesk at (301) 846-5115 or NCI-FHelpdesk@mail.nih.gov and they can assist with this process. If you have any questions contact the Yellow Task System Administrator at YTAdmin@mail.nih.gov.

Yellow Task System Approval Steps

NCI – Contracting Officer Technical Representative (COTR)

The NCI COTR will receive an email notification that a new request has been submitted. This notification will include a link to the new request. The COTR has the ability to use the web-based email within the system, as well as view any correspondence from other participants. The COTR reviews requests for scientific suitability under the OTS contract. For both non-routine and non-severable work, approval is needed by the COTR in order for the request to proceed through the system.

NCI – Contracting Officer

The NCI Contracting Officer will receive an email notification that a new request has been submitted. This notification will include a link to the new request. The Contracting Officer has the ability to use the web-based email within the system as well as view any correspondence from other participants. The Contracting Officer reviews requests for contractual suitability under the OTS contract and for work identified as non-severable, verifies that the work falls into this funding category. For both non-routine and non-severable work, approval is needed by the Contracting Officer in order for the request to proceed through the system.

Leidos Biomedical Research Inc. Yellow Task Coordinator

The Yellow Task Coordinator will be notified by the Yellow Task System four times during the process of a request.

1) The Yellow Task Coordinator will receive an initial notification that a yellow task request has been submitted. The request will then be forwarded to the NCI for Office of Scientific Operations and Management Operations Support Branch approvals for non-routine and non-severable work; otherwise, the Yellow Task Coordinator will forward the task directly to the Leidos Biomed Program Area for their review.

2) Once the task receives approval from the NCI PO/CO, the coordinator will be notified that it has action required for the task. The coordinator will then forward the task to a Leidos Biomed Program Manager for review.

3) The Yellow Task Coordinator will receive another notification requesting approval once the Leidos Biomed Program Manager has submitted a response.

4) Finally, once approval has been received by the Administrative Officer, the Yellow Task Coordinator will be notified. For non-severable work requests, the task will be held until the contract modification is received, at which point the Yellow Task Coordinator will input the modification number, amount, and date and approve the task.

Leidos Biomedical Research Inc. Program Manager (Action Person)

The Program Manager will be notified by the Yellow Task System two times during the process of a request.

1) The Program Manager will receive an email notification that a request has been submitted and assigned to their program. The Program Manager has the ability to use the web-based email within the system as well as view any correspondence from other participants. A response including any attachments (documents, cost estimates, etc.) will be compiled and submitted to the Yellow Task Coordinator.

2) The Program Manager will receive an email notification of tasks that have completed the process and have been approved.

Leidos Biomedical Research Inc. Chief Administrative Officer (CAO)

The CAO will receive the request along with the provided response electronically through the system from the Yellow Task Coordinator. If in agreement, the CAO will approve the response and submit it to the Requester. The CAO has the ability to use the web-based email within the system as well as view any correspondence from other participants.

Requester

The Requester will be notified by the Yellow Task System three times during the process of a request.

1) Once a new task has been submitted, the Requester will receive an email containing a link to the task.

2) After the request has received the appropriate approvals, the Requester will receive a response to their request. This response will include the proposed approach for completing the statement of work, as well as a cost estimate. If the Requester is in agreement with the Leidos Biomed response, they will select the approval button and submit. This will automatically send the request to the Administrative Officer for approval. If the Requester does not agree with the response, they have the option to disapprove the response or to contact the Leidos Biomed Program Area (Action Person) using the email mechanisms within the task for further discussions.

3) The Requester will receive an email notification of tasks that have completed the process and have been approved.

Email reminders are sent to the Requester each week when they have the action on a task. After 28 days without action, the system automatically will disapprove the task.

Note: Use the Yellow Task Web mail link to clarify any questions or issues before disapproving.

Administrative Officer (AO)

The AO will be notified by the Yellow Task System three times during the process of a request.

1) The AO will be notified that a request has been submitted. There is no formal action required at this time.

2) The AO will receive an email notification upon approval by the Requester with a link to the original request and the Leidos Biomed response. The AO will have the option of approving the response, disapproving the response, or through the yellow task web email system, asking questions or requesting further discussions. For non-severable work requests, the AO must add NBS request number; amount, date, and CAN number to the yellow task before approving the request.

3) The AO will receive an email notification of tasks that have completed the process and have been approved.

Email reminders are sent to the AO, with a copy to the Requester, when they have the action on a task. After 28 days without action, the system will automatically disapprove the task.

Note: Use the <u>Yellow Task Web mail link</u> to clarify any questions or issues before disapproving.

NCI – Facility Administrator

The NCI Facility Administrator will receive an email notification that a new request has been submitted. This notification will include a link to the new request. The Facility Administrator has the ability to use the web-based email within the system as well as view any correspondence from other participants.

<u>Request Status</u>

All participants have the ability to check the status of a request by clicking on the link provided in the email notification of a request. The section entitled "Current Step" will provide the location of the step. For example, it might say "Awaiting Leidos Biomed Task Coordinator Approval." This indicates the request is with the Leidos Biomed Yellow Task Coordinator. The system provides the ability to email the Yellow Task Coordinator within the system.

<u>**Requesting Support Using the Yellow Task System**</u>
<u>**Frequently Asked Questions (FAQs)**</u>

How do I know what system to use when requesting services / support?
The services portal located on the NCI Frederick website will guide you to the appropriate system.
http://ncifrederick.cancer.gov/services/

How do I check the status of my request?
Click on the link that is provided in the email notification of your request. The section title "Current Step" will provide the location of the task. More detailed status updates are posted within the email mechanism of most tasks. To view the email within each task, click on "For email correspondence for this request click here." Questions regarding the status can also be directed to the Yellow Task Program office.

How do I change a request or upload additional documents after the Yellow Task has been submitted?
Changes to a request including uploading additional documents can be made using the email mechanism within each task. The email can be accessed through the "Yellow Task Web Mail System" link found on the front page of a Yellow Task request. Note: The email mechanism cannot be accessed through a read-only link. Only users with yellow task homepage accounts can send an email through this system. Users accessing the read-only links can view the email that has been sent through the system.

The AO listed in the YT System is not my AO, why is this?
In the YT System, one AO is assigned approval authority for each division or institute. This individual is responsible to work with the other AOs within their ARC to obtain the appropriate information in order for them to be able to approve the request.